

Message Text

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FM AMEMBASSY PARIS

TO SECSTATE WASHDC PRIORITY 6981

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SUBJECT: PROGRESS REPORT ON THE PROGRAMME OF WORK
IN NUCLEAR ENERGY

1. FOLLOWING IS TEXT IEA/GB(78)24, PROGRESS REPORT
ON THE PROGRAMME OF WORK IN NUCLEAR ENERGY, PROVIDED
DELEGATION BY BUREAU TWO DIRECTOR KELLY FOR
CLEARANCE BY ROSEN (EB/FSE).

2. BEGIN TEXT. THIS REPORT IS CIRCULATED TO THE
GOVERNING BOARD WITHOUT PREJUDICE TO ANY
COMMENTS THAT MAY BE MADE ON IT BY THE SLT AT ITS
MEETING ON 12TH-14TH SEPTEMBER 1978.

3. INTRODUCTION

SINCE THE PREVIOUS REPORT TO THE GOVERNING BOARD IN
MARCH, WORK HAS CONTINUED ON THE SEVERAL TASKS OF
THE NUCLEAR WORK PROGRAMME. AS REPORTED IN IEA/GB(78)
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12, THE NUCLEAR SUB-GROUP OF THE STANDING GROUP ON
LONG-TERM COOPERATION HAS BEEN GIVING PRIORITY TO
TASKS 1, 2, 5 AND 6A. THE NUCLEAR SUB-GROUP HAS
MET THREE TIMES SINCE THE GOVERNING BOARD APPROVED THE
PROGRAMME OF WORK IN JANUARY, 1978. THE COMMITTEE
ON ENERGY RESEARCH AND DEVELOPMENT HAS ALSO REVIEWED
ACTIVITIES RELATING TO TASK 6B. THIS REPORT

DESCRIBES THE STATUS OF THESE ACTIVITIES.

4. TASK 1: CRITICAL ASSESSMENT OF ELECTRICITY AND
NUCLEAR GROWTH PROJECTIONS

THE NUCLEAR SUB-GROUP HAS ASSESSED COUNTRIES' FORECASTS OF ELECTRICITY DEMAND AND NUCLEAR PLANT CAPACITY THROUGH 1990 BASED ON COUNTRY SUBMISSIONS TO INFCE. THE FINDINGS MAY BE FOUND IN IEA/SLT(78)92, THE MOST IMPORTANT OF WHICH ARE:

-- MOST IEA COUNTRIES HAVE, OR ARE IN THE PROCESS OF REDUCING THEIR ELECTRICITY LOAD GROWTH FORECASTS. THE INFCE SUBMISSIONS CONTAINED TWO ELECTRICITY DEMAND PROFILES. THE LOW DEMAND PROFILE WHICH IS 7 - 7 1/2 PER CENT BELOW THAT SUBMITTED IN THE 1977 SLT REVIEW WAS JUDGED MOST PROBABLE BECAUSE OF LOWER ANTICIPATED ECONOMIC GROWTH AND IN NORTH AMERICA BECAUSE OF THE POSSIBILITY OF MORE NATURAL GAS THAN PREVIOUSLY ANTICIPATED.

-- THE FLUIDITY OF THE NUCLEAR SITUATION IN IEA COUNTRIES IS EMPHASIZED IN IEA NUCLEAR POWER FORECASTS.

1977 1978 INFCE JULY, 1978
SLT HIGH LOW NSG ASSESSMENT
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CASE	CASE	POSSIBLE	AT RISK
IEA NUCLEAR CAPACITY (GW)			
1985	246	239	201
1990	411	412	332
			205-210
			25
			335-340
			75

THE NUCLEAR SUB-GROUP'S SUMMARY ASSESSMENT OF WHAT IS THOUGHT POSSIBLE TO ATTAIN WILL BE AVAILABLE ONLY IF GOVERNMENT POLICIES ARE IMPLEMENTED WITH RESOLVE. IF NOT, THERE IS THE PROSPECT OF THREE TO FIVE YEAR SLIPPAGE IN NUCLEAR DEVELOPMENT PROGRAMMES.

-- THE SLIPPAGE IN NATIONAL NUCLEAR PROGRAMMES WILL INCREASE THE REQUIREMENT FOR OIL IMPORTS FOR ELECTRICITY GENERATION, ALTHOUGH THIS INCREASE WILL BE MITIGATED SOMEWHAT BY THE LOWER ELECTRICITY DEMAND FORECASTS. IN 1976, OIL-FIRED GENERATION PRODUCED 891 TWH IN IEA COUNTRIES. NATIONAL SUBMISSIONS TO THE 1977 SLT REVIEW FORESAW OIL-FIRED

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GENERATION INCREASING TO 1125 TWH IN 1985 AND THEN
BEING CUT BACK TO 936 TWH IN 1990 MAINLY DUE TO
PROJECTED LARGE INCREMENTS OF NUCLEAR CAPACITY
(AND COAL CAPACITY IN NORTH AMERICA). A "WORST
POSSIBLE" CASE FOR OIL-FIRED GENERATION FOR THE
INFCE LOW ELECTRICITY GROWTH PROFILE HAS BEEN DERIVED
BASED ON THE ASSESSMENT OF WHAT NUCLEAR CAPACITY
IS AT RISK AND WHAT WOULD BE THE LIKELY RE COURSE
- COAL OR OIL. THE OIL-FIRED GENERATION IN THIS
"WORST POSSIBLE" CASE IS 1100 TWH IN 1985 AND 1300
TWH IN 1990. IT IS ONLY IN NORTH AMERICA THAT THE
1990 OIL-FIRED GENERATION FIGURES ARE IN THE RANGE
OF 1976 PRODUCTION; IN BOTH OTHER IEA REGIONS, THEY
ARE MARKEDLY HIGHER. SHOULD THE "WORST POSSIBLE"
INDEED HAPPEN, THE DEMAND FOR OIL TO GENERATE
ELECTRICITY IN 1990 COULD BE AS HIGH AS 320 MTOE,
90 MTOE, OR 1.8 MILLION BARRELS/DAY OVER AND ABOVE
THE PROJECTION CONTAINED IN THE 1977 SLT REVIEW.

--IN SUMMARY, NOT ONLY ARE THE OPPORTUNITIES
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TO DISPLACE OIL IN ELECTRICITY GENERATION NOT GOING

TO BE REALIZED IN MANY COUNTRIES, BUT THE ELECTRICITY DEMAND PROJECTED IN THE IEA REGION WILL HAVE TO BE BASED IN PART ON INCREASED OIL-FIRED GENERATION. CLEARLY, STRONGER GOVERNMENT POLICY ACTION IS REQUIRED IN MANY IEA COUNTRIES TO CONSTRAIN ELECTRICITY LOAD GROWTH AND TO BOLSTER NUCLEAR AND COAL-FIRED GENERATION EXPANSION.

5. TASKS 2 AND 5: EXAMINATION OF GOVERNMENT POLICY CONDITIONS RELATING TO URANIUM RAW MATERIALS (TASK 2) AND URANIUM ENRICHMENT SERVICES (TASK 5)

ON THESE TASKS, THE NUCLEAR SUB-GROUP REQUESTED SPECIFIC INFORMATION FROM MEMBER COUNTRIES ON THEIR EXPERIENCE RELATING TO POSSIBLE CONSTRAINTS. THE INFORMATION SUBMITTED PROVED TO BE VERY LIMITED. IT IS ASSUMED THAT MOST ATTENTION WAS BEING DEVOTED TO THE EXAMINATION OF THESE QUESTIONS WITHIN INFCE. AFTER THE NEXT PLENARY CONFERENCE OF INFCE, SCHEDULED IN NOVEMBER, AT WHICH TIME PROGRESS ASSESSMENTS OF ALL THE INFCE WORKING GROUPS WILL BE MADE, THE NUCLEAR SUB-GROUP WILL DETERMINE WHETHER IT SHOULD STEP UP ITS ACTIVITIES IN THESE TASKS.

6. TASK 6A: ARRANGEMENTS FOR BACK-END OF FUEL CYCLE

IT WILL BE RECALLED THAT EARLY DISCUSSIONS IN THE NUCLEAR SUB-GROUP, AS WELL AS IN THE GOVERNING BOARD, INDICATED THAT WASTE DISPOSAL AND SPENT FUEL STORAGE OR DISPOSAL WERE PROBABLY THE MOST CRUCIAL NEAR TERM OPERATIONAL PROBLEMS WHICH COULD AFFECT UNCLASSIFIED

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NUCLEAR POWER PLANS. THE SUB-GROUP SUBSEQUENTLY ADDRESSED THIS AREA, INCLUDING OBTAINING REPORTS FROM NEA; BUT NO INITIATIVE TOWARDS A COLLABORATIVE SOLUTION HAS YET EMERGED.

7. TASK 6B: DEFINITION OF MULTINATIONAL DEMONSTRATION PROGRAMME FOR SPENT FUEL AND WASTE

THE CRD HAS FOLLOWED CLOSELY THE WORK OF THE NEA ON THE POSSIBILITY OF A MULTINATIONAL DEMONSTRATION PROGRAMME FOR LONG TERM DISPOSITION OF SPENT FUEL AND WASTE IN ACCORDANCE WITH TASK 6B. THE IEA HAS ENCOURAGED THE NEA TO UNDERTAKE SUCH A PROGRAMME. AT THE MOST RECENT CRD MEETING, NEA REPORTED ON A SPECIAL SESSION ON RADIOACTIVE WASTE MANAGEMENT HELD BY THE OECD STEERING COMMITTEE FOR NUCLEAR ENERGY,

WHERE THREE NATIONAL FACILITIES FOR EXPERIMENTAL PROJECTS (IN THREE DIFFERENT GEOLOGICAL FORMATIONS) HAD BEEN EXAMINED AS A BASIS FOR INTERNATIONAL CO-OPERATION, THOUGH NOT INVOLVING RADIOACTIVE WASTE MATERIAL. A NUMBER OF COUNTRIES HAVE INDICATED THEIR READINESS TO JOIN AT LEAST ONE OF THE PROJECTS; EXPLORATORY PLANNING SESSIONS RELATED TO SETTING UP SUCH CO-OPERATIVE PROJECTS ARE SCHEDULED DURING SEPTEMBER AND OCTOBER. HOWEVER, THERE HAS NOT YET EMERGED IN THE NEA A CONSENSUS THAT MULTINATIONAL

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DEMONSTRATIONS TO INVOLVE THE IMPLEMENTING OF ACTUAL RADIOACTIVE WASTE IN GEOLOGICAL FORMATIONS ARE NECESSARY OR DESIRABLE AT THIS TIME.

8. INFCE

THE SECRETARIAT HAS CONTINUED TO KEEP IN CLOSE CONTACT WITH INFCE ACTIVITIES, PARTICULARLY WORKING GROUP 1: URANIUM AVAILABILITY, WORKING GROUP 3: ASSURANCE OF SUPPLY AND WORKING GROUP 7: WASTE MANAGEMENT AND DISPOSAL. THESE ARE THE GROUPS MOST DIRECTLY ENGAGED IN AREAS RELATED TO THE IEA WORK PROGRAMME. IT HAS BEEN AGREED THAT THE NUCLEAR SUB-

GROUP ASSESSMENT OF NUCLEAR CAPACITIES IN IEA
COUNTRIES THROUGH 1990 WOULD BE USED IN THE WORK OF
WORKING GROUPS 1 AND 2.

9. FUTURE ACTIVITIES

ON TASK 1, IT HAS BEEN DECIDED THAT ELECTRICITY
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DEMAND FORECASTS WARRANT CLOSER STUDY. NATIONAL FORECASTS OF ELECTRICITY DEMAND AND NUCLEAR POWER AVAILABILITY WILL AGAIN COME UNDER SCRUTINY IN THE 1978 SLT REVIEW. ON TASKS 2 AND 5, FUTURE ACTIVITY, AS STATED ABOVE, WILL DEPEND UPON DEVELOPMENTS IN INFCE THIS AUTUMN. ON TASKS 6A AND B, THE NUCLEAR SUB-GROUP AND THE CRD WILL CONTINUE TO MONITOR THE WORK OF THE NEA IN THIS FIELD AND FUTURE ACTIVITY WILL BE DEPENDENT UPON PROGRESS IN THE NEA. RELATED ISSUES WILL BE EXAMINED IN THE 1978 CRD REVIEW. END TEXT.

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